

Reports Overview

Report #	Report Name	Basic Function	Uses	Parameters / Notes
6	Demographic – Admitted Clients	Displays counts of client demographics, i.e. gender, age, race, ethnicity, for a prescribed timeframe	Demographic information	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
7	Demographic Summary By Service Level – Admitted Clients	Displays counts of client demographics, i.e. gender, age, race, ethnicity, by admission service level	Demographic information by service level	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
8	Wait List Report	Displays in real time clients on the wait list	Identify clients on wait list, interim service needs, days on wait list, service level	<ul style="list-style-type: none"> • None • Run at Business level or Treatment level
9	Provider Dashboard – Performance Statistics	Displays performance statistics, i.e. number of admissions, screenings, referrals, etc. for a prescribed timeframe	At a glance view of volume of work completed	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
10	Counselor Dashboard – Performance Statistics	Displays performance statistics, i.e. number of admissions, screenings, referrals, etc. by counselor for a prescribed time	At a glance view of volume of work completed	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
11	Provider Care Profile	Displays number of admissions, referrals and discharges, numbers of discharges / transfers by discharge reason, average length of stay by service type (residential, outpatient, etc.)	Provider management	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
12	Counselor Care Profile	Displays number of admissions, referrals and discharges, numbers of discharges / transfers by discharge reason, average length of stay by service type (residential, outpatient, etc.) by counselor	Counselor management	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
13	Discharge Referral Summary	Displays number and percentage of total discharges by outgoing referral type	Referral management	<ul style="list-style-type: none"> • Date range required • Run at Business level

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14	Individual Counselor Activity	Displays documented events by client that have been entered by a specified counselor for a specified date range	This report is listed by client, however it is not a chronological list of events for that client, it is a list of the events that the specific counselor documented for that client	<ul style="list-style-type: none"> • Date range required • Run at Business level
15	Active Clients Not Receiving Services	Displays admitted clients and last activity recorded for a specified month / year	Manage open admissions that should have been discharged, can also be used to troubleshoot admission / discharge record linking problems	<ul style="list-style-type: none"> • Month and year required • Run at Business level or Treatment level
16	Progress Notes Audit Report	Displays progress notes with topic detail entered by a specified counselor for clients within a specified date range	Use to monitor consistency in residential unit counts as well as monitoring progress note for each counselor caseload	<ul style="list-style-type: none"> • Date range required • Run at Business level
17	Discharged Clients by Counselor	Displays clients discharged by specified counselor	Length of stay monitoring	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
18	Admitted Clients by Provider	Displays counselor caseload by location with last activity and discharge date included	Caseload management, open admission management, can also be used to troubleshoot admission / discharge record linking problems	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
19	Active Client's Length of Stay by Level of Service	Displays client, counselor, service level, priority population status, intake, discharge, and length of stay information for a specified date range	Priority population management, intake completion management	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
20	Client's Movement Through Continuum of Care	Displays treatment location, admission and discharge date where applicable, priority population, diagnosis, and length of stay by client within a specified date range	Track client through continuum of care, can also be used to troubleshoot admission / discharge record linking problems	<ul style="list-style-type: none"> • Date range required • Run at Business level

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21	Referrals by Counselor	Displays clients referred to other funded or non-funded agencies with date and follow-up information by counselor within a specified date range	Referral follow-up monitoring	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
22	Client Progress by Client	Displays scores for symptoms, function, and mental status exam		<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
23	Client Admission / Discharge Status	Displays admission / discharge status, demographics and primary substance for clients within a specified date range	Open admission management	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
24	Active Client Census with Length of Stay	Displays active clients by length of stay	Manage open discharge records, active admissions by location	<ul style="list-style-type: none"> • Date range required • Run at Business level or Treatment level
25	Client Progress and Chart Notes	Displays note date, topic, primary counselor, treatment location, note and document type by client	Caseload documentation management	<ul style="list-style-type: none"> • Date range required • Run Treatment level